

## 2003 State Health Insurance Assistance Program (SHIP)/Senior Patrol Monthly Report

Name of Grantee Agency Reporting	State	Reporting Period: _____ / _____ month / year	
Person Completing Report	Title	Telephone No.	

  

<b>SECTION 1 - NUMBER OF ACTIVE Counselors and Hours</b>	<b>TOTAL</b>	<b>SECTION 2 - NUMBER OF LOCAL COORDINATORS/SPONSORS AND HOURS</b>	<b>TOTAL</b>
a. # Volunteer Counselors		a. # Volunteer (unpaid) Coordinators	
b. # SHIP-Paid Counselors		b. # SHIP-Paid Coordinators	
c. # In-kind Paid Counselors		c. # In-kind Paid Coordinators	
<b>TOTAL # Counselors (a+b+c)</b>		<b>TOTAL # Coordinators (a+b+c)</b>	
d. Volunteer Counselor Hours		d. Volunteer (unpaid) Coordinator Hours	
e. SHIP-Paid Counselor Hours		e. SHIP-Paid Coordinator Hours	
f. In-kind Paid Counselor Hours		f. In-kind Paid Coordinator Hours	
g. Value of In-kind		g. Value of In-kind	
<b>SECTION 3 - NUMBER OF OTHER PAID STAFF AND HOURS</b>	<b>TOTAL</b>	<b>SECTION 4 - COUNSELOR TRAININGS</b>	<b>TOTAL</b>
a. # SHIP-Paid Other Staff		a. # <b>Initial</b> Training(s) for New SHIP Counselors	
b. # In-kind Paid Other Staff		b. # New SHIP Counselors Attending <b>Initial</b> Training	
c. SHIP-Paid Other Staff Hours		c. Total # Counselor Hours in <b>Initial</b> Training	
d. In-kind Paid Other Staff Hours		d. # <b>Update</b> Training(s) for SHIP Counselors	
		e. # SHIP Counselors Attending <b>Update</b> Training	
		f. Total # Counselor Hours in <b>Update</b> Training	
<b>SECTION 5 - NUMBER OF ACTIVE SENIOR PATROL MEMBERS AND HOURS</b>	<b>TOTAL</b>	<b>SECTION 6 - NUMBER OF LOCAL SENIOR PATROL COORDINATORS AND HOURS</b>	<b>TOTAL</b>
a. # Volunteer SP Members		a. # Volunteer (unpaid) Senior Patrol Coordinators	
b. # SP-Paid Members		b. # Senior Patrol-Paid Coordinators	
c. # In-kind Paid SP Members		c. # In-kind Paid Senior Patrol Coordinators	
d. Value of In-kind		d. Value of In-kind	
<b>TOTAL # Counselors (a+b+c)</b>		<b>TOTAL # Coordinators (a+b+c)</b>	
e. Senior Patrol Member Hours		e. Volunteer (unpaid) Senior Patrol Coordinator Hours	
f. SP-Paid Member Hours		f. Senior Patrol Paid Coordinator Hours	
g. In-kind Paid SP Member Hours		g. In-kind Paid Senior Patrol Coordinator Hours	
h. Value of In-kind		h. Value of In-kind	

SECTION 7 - NUMBER OF SENIOR PATROL OTHER PAID STAFF AND HOURS		TOTAL	SECTION 8 - SENIOR PATROL TRAININGS		TOTAL
a. # Paid Other Staff			a. # <b>Initial</b> Training(s) for SP Members		
b. # In-kind Paid Other Staff			b. # New SP Members Attending <b>Initial</b> Training		
c. Value of In-kind			c. Total # SP Member Hours in Initial Training		
d. SP-Paid Other Staff Hours			d. # Update Training(s) for SP Members		
e. In-kind Paid Other Staff Hours			e. Total # SP Member Hours in <b>Update</b> Training		
f. Value of In-kind			f. # SP Members Attending <b>Update</b> Training		
<b>SECTION 9 - NUMBER OF ACTIVE COUNSELORS WITH THE FOLLOWING CHARACTERISTICS (OPTIONAL)</b>					
<b>a. Years of SHIP Service:</b>		<b>c. Disability Status</b>		<b>e. Ethnicity/Race</b>	
Less than 1 year		Disabled		American Indian or Alaska Native	
1 year up to 3 years		Not disabled		Asian	
3 years up to 5 years		Not collected		Black or African-American	
Over 5 years				Hispanic or Latino	
Not collected				Native Hawaiian or other Pacific Islander	
<b>b. Age:</b>		<b>d. Gender</b>		White, not of Hispanic origin	
Less than 65 years of age		Female		Other	
65 years or older		Male		Not collected	
Not collected		Not collected			
<b>SECTION 10 - WEB-SITE VISITORS (if applicable)</b>					
Total # of visits/visitors to web-site during the reporting period: _____					
<b>SECTION 11 - THREE CASE SUMMARIES (Please attach additional pages.)</b>					
<b>SECTION 12 - ACTIVITIES, LESSONS LEARNED, SIGNIFICANT EVENTS</b>					
Briefly describe on a separate page. This section should address the following four topic areas: outreach (including activities targeted at underserved populations), information access and dissemination, training, partnerships, networking and technical assistance or support needed from the State Office.					
Section 13 - Number of Counseling Sites: _____					
Section 14 - Number of trainings attended by staff: _____					
Section 15 - Attach a current list of Volunteers					
I state that to the best of my knowledge, this information is true.					
Signature: _____ (Person preparing report)					
I, the Director or Designated person have verified this information and to the best of my, knowledge this information is true.					
Signature: _____					

**2003**  
**Instructions for Completing the**  
**State Health Insurance Assistance Program (SHIP)**  
**Resource Report**

**Submitted each month**

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f) In-kind Paid Counselor Hours	
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c) # In-kind Paid Coordinators	
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e) SHIP-Paid Coordinator Hours	
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d) Value of In-Kind	
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g) In-kind Paid SP Member Hours	
h) Value of In-Kind	
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a) # Volunteer (unpaid) SP Coordinators	
b) # SP-Paid Coordinators	
c) # In-kind Paid SP Coordinators	
d) Value of In-Kind	
TOTAL # Coordinators	
e) Volunteer (unpaid) SP Coordinator Hours	
f) SP-Paid Coordinator Hours	
g) In-kind Paid SP Coordinator Hours	
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## EXPLANATION OF DATA ITEMS

**The following data items should be completed for the entire state for each month.**

### **Definitions for Sections 1 and 3.**

**State Office:** The state SHIP office is the central office for the SHIP program, where the state SHIP project director, trainers, administrative staff, and/or state toll-free helpline counselors are usually based. These personnel provide counseling to clients from the entire state, not necessarily from only one area/region of the state. Counselors (volunteer or paid) and other personnel who are based in the state office should be counted in the State Office columns.

**Local and Field Sites:** Local and field sites refer to locations outside the state SHIP office where counselors, coordinators/sponsors, other SHIP staff, or volunteers may be based and/or provide counseling. Examples: A local/regional SHIP program may serve one or more cities/counties and may be located in a local hospital, RSVP (Retired Senior Volunteers Program), senior center, Area Agency on Aging, Senior Information and Referral program, a senior legal services program, or an independent non-profit agency. Counselors (volunteer or paid) and other personnel who are based in these local or field sites should be counted in the All Other Local and Field Site columns.

**Note:** The number of persons working or volunteering for a SHIP may be counted more than once since some coordinators or staff also provide counseling. If this is the case, then include them in both the counselor section (Section 1) and the coordinator section (Section 2). However, their number of hours for the reporting period should not be double-counted. Estimate the hours a person provides towards counseling separate from the hours spent on other tasks such as coordinating a program.

## SECTION 1 - NUMBER OF ACTIVE COUNSELORS AND HOURS

**Active Counselor:** any person who provided counseling, information, or assistance related to Medicare or other health insurance for a SHIP during the reporting period.

Do not count counselors who did not provide any counseling during the reporting period, even if they were trained. The three most common types of counselors utilized by SHIP programs include: 1) volunteer, 2) SHIP-paid, and 3) in-kind paid. These include telephone helpline counselors.

a. # of Volunteer Counselors: the number of persons who:

- provided SHIP counseling hours during the reporting period; AND
- were registered volunteer counselors (they have signed some type of Counselor Agreement or Memorandum of Understanding (MOU)); AND
- did not receive paid compensation for their time or services (but may have received travel reimbursement).

Volunteer counselors can also include local/area coordinators/sponsors if they also provided SHIP counseling AND were not paid by the SHIP program.

b. # of SHIP-Paid Counselors: the number of persons who:

- provided SHIP counseling hours during the reporting period; AND
- received any compensation for their time and services from the SHIP program, regardless of whether their salary was funded by CMS, the state, or some other funding agency.

Examples: state project directors, receptionists, telephone operators, and paid local/regional coordinators/sponsors, as long as they provided counseling during the reporting period as part of their normal duties.

c. # of In-kind Paid Counselors: the number of persons who:

- provided SHIP counseling during the reporting period; AND
- were registered SHIP counselors who have signed some type of Counselor Agreement or Memorandum of Understanding; AND
- received compensation for their time and services from a program other than SHIP.

Examples include: RSVP staff, hospital staff, senior center staff, Senior Information and Referral staff, Area Agency on Aging staff, and outreach social workers, who may or may not also be local/regional coordinators/sponsors.



**TOTAL # Counselors (a+b+c):** Add the numbers of the three types of counselors. This total should be the same as the totals in Section 9 of the Resource Report Form.

Note: The hours reported in the next data items should be from the same persons counted in a), b), and c).

d. Volunteer Counselor Hours: the total number of hours the volunteer SHIP counselors (counted in a) contributed to the SHIP program counseling or working directly on behalf of clients. This includes the total number of hours spent on the following activities to resolve clients issues:

- counseling,
- researching,
- referring,
- advocating (calling agencies on the client's behalf),
- trying to reach the client,
- waiting to meet with a client,
- traveling,
- preparing materials to send to the client, and
- completing paperwork/forms to report the client contact.

e. SHIP-Paid Counselor Hours: the total number of hours the SHIP-paid counselors (counted in b.) spent in counseling activities described in d) above.

f. In-kind Paid Counselor Hours: the total number of hours the in-kind paid counselors (counted in c.), spent in counseling activities described in d) above.

g. Value of In-Kind

## **SECTION 2 - NUMBER OF LOCAL COORDINATORS/SPONSORS AND HOURS**

**Coordinator/sponsor definition:** a person from a local or field SHIP site (see above definitions) who may do one or more of the following:

- supervises counselors,
- recruits counselors,
- trains counselors,
- meets with counselors,

- provides administrative support (schedules meetings, provides travel reimbursement),
- publicizes the SHIP program,
- oversees data reporting,
- distributes informational materials,
- conducts public and media activities such as presentations or health fairs.

Do NOT include persons/organizations that:

- only provide meeting or office space (these can be described in Section 8),
- contribute no time to the SHIP program,
- provide the same services as a SHIP coordinator for another similar program that is not considered part of the SHIP program.

NOTE: Coordinators can also counsel clients, and thus may also be included both in the number of counselors in Section 1 a), b), or c) and in the number of coordinators in Section 2 a), b), or c). However, do not double count their hours by including total hours in both Section 1 d), e) or f) and Section 2 d), e) or f). Rather, separate counseling hours from coordinator hours if possible. For example, if a coordinator spends 8 hours per week counseling and the remaining 32 hours per week performing SHIP coordinator functions, you would indicate 8 hours X 4 weeks = 32 hours in Section 1 d), e), or f) and 32 X 4 weeks = 128 hours in Section 2 d), e), or f).

**a. # of Volunteer (unpaid) Coordinators:** the number of persons who:

- performed the SHIP coordinator functions defined above AND
- did not receive compensation for their time or services (but may have received travel reimbursement).

**b. # of SHIP-paid Coordinators:** the number of persons who:

- performed the SHIP coordinator functions defined above AND
- received compensation for their time from the SHIP program, regardless of whether their salary was funded by CMS, the state, or some other funding agency.

**c. # of In-kind Paid Coordinators:** the number of persons who:

- performed the SHIP coordinator functions defined above AND
- received compensation from a program other than SHIP.

Examples include: RSVP staff, hospital staff, senior center staff, Senior Information and Referral staff, Area Agency on Aging staff, and outreach social workers.

**TOTAL # Coordinators (a+b+c):** Add the numbers of the three types of coordinators.

- d. **Volunteer (unpaid) Coordinator hours:** the total number of hours the volunteer (unpaid) coordinators (counted in a.) contributed to the SHIP program performing the functions of a coordinator, as defined above.
- e. **SHIP-Paid Coordinator Hours:** the total number of hours the SHIP-Paid coordinators (counted in b.) contributed to the SHIP program performing the functions of a coordinator, as defined above.
- f. **In-kind Paid Coordinator Hours:** the total number of hours that the In-kind paid coordinators (counted in c.) contributed to the SHIP program performing the functions of a coordinator, as defined above.
- g. **Value of In-Kind**

### **SECTION 3 - NUMBER OF OTHER PAID STAFF AND HOURS**

**Other paid staff definition:** persons who performed other functions for the SHIP aside from the counselor and coordinator functions described above. These persons can include: state project directors, trainers, receptionists, administrative staff, etc. These types of paid staff can work in the state office or local/field sites.

- a. **# SHIP-Paid Other Staff:** the number of persons who:
- performed the functions of other paid staff defined above AND
  - received compensation for their time and services from the SHIP program, regardless of whether their salary was funded by CMS, the state, or some other funding agency.
- b. **# In-kind Paid Other Staff:** the number of persons who:
- performed the functions of other paid staff defined above AND
  - received compensation for their time and services by a program other than SHIP.

Examples include: RSVP staff, hospital staff, senior center staff, Senior Information and Referral staff, Area Agency on Aging staff, and outreach social workers.

- c. **SHIP-Paid Other Staff Hours:** the total number of hours that the SHIP-Paid other staff (counted in a.) contributed to the SHIP program in activities defined above.

- d. **In-kind Paid Other Staff Hours:** the total number of hours that the In-kind paid other staff (counted in b) contributed to the SHIP program in activities defined above.

## SECTION 4 - COUNSELOR TRAININGS

- a. **# Initial Training(s) for New SHIP Counselors:** the total number of initial training sessions held throughout the state during the reporting period for new counselors, including volunteer or paid counselors. For example, if 20 local sites in the state conduct one initial training each during the reporting period, report 20 initial training's. If 4 local sites hold 2 initial training's each, report 8 initial training's. Initial training's that last several days should be counted as one training.
- b. **# New SHIP Counselors Attending Initial Training(s):** the total number of new counselors, including volunteer or paid counselors, who attended an initial training session for new counselors.
- c. **TOTAL # Counselor Hours in Initial Training(s):** multiply the number of counselors who attended initial training (counted in b.) by the number of hours of the initial training session. For example, if ten counselors attended a two day (totaling 16 hours) initial training session, then report 160 total counselor hours in initial training.
- d. **# Update Training(s) for SHIP Counselors:** the total number of update training sessions held throughout the state during the reporting period for counselors, including volunteer or paid counselors. An update training includes regular meetings or training sessions during which counselors are given updates on topics including but not limited to: Medicare changes, health insurance plan choices, counselor skills development, and SHIP program procedures. For example, if 5 local sites in the AAA Region conduct one update training each during the reporting period, report 5 update training's. If 4 local sites hold 2 update training's each, report 8 update training's. Update training's that last several days should be counted as one training.
- e. **# SHIP Counselors Attending Update Training(s):** the total number of counselors, including volunteer or paid counselors, who attended an update training session.
- f. **TOTAL # Counselor Hours in Update Training(s):** multiply the number of counselors who attended update training (counted in e.) by the number of hours of the update training session. For example, if ten counselors attend a two hour update training session, then report 20 total counselor hours in update training.

## SECTION 5 - NUMBER OF ACTIVE SENIOR PATROL MEMBERS AND HOURS

**Active Senior Patrol Member:** any person who provided outreach or presentations related to Medicare or other health insurance fraud for a SHIP during the reporting period. Do not count members who did not provide any counseling during the reporting period, even if they were trained. The three most common types of members utilized by SP programs include: 1) volunteer, 2) SP-paid, and 3) in-kind paid.

a. # of Volunteer Counselors: the number of persons who:

- provided SHIP counseling hours during the reporting period; AND
- were registered volunteer counselors (they have signed some type of Counselor Agreement or Memorandum of Understanding (MOU)); AND
- did not receive paid compensation for their time or services (but may have received travel reimbursement).

Volunteer member can also include local/area coordinators/sponsors if they also provided SP outreach/presentations AND were not paid by the SHIP program.

b. # of SP-Paid Counselors: the number of persons who:

- provided SP outreach/presentation hours during the reporting period; AND
- received any compensation for their time and services from the SHIP program, regardless of whether their salary was funded by CMS, the state, or some other funding agency.

Examples: state project directors, receptionists, telephone operators, and paid local/regional coordinators/sponsors, as long as they provided counseling during the reporting period as part of their normal duties.

c. # of In-kind Paid SP Members: the number of persons who:

- provided SP outreach/presentations during the reporting period; AND
- were registered SP member who have signed some type of Counselor Agreement or Memorandum of Understanding; AND
- received compensation for their time and services from a program other than SHIP.

Examples include: RSVP staff, hospital staff, senior center staff, Senior Information and Referral staff, Area Agency on Aging staff, and outreach social workers, who may or may not also be local/regional coordinators/sponsors.

**TOTAL # SP Members (a+b+c):** Add the numbers of the three types of members. This total should be the same as the totals in Section 9 of the Resource Report Form.

Note: The hours reported in the next data items should be from the same persons counted in a), b), and c).

d. Volunteer Counselor Hours: the total number of hours the volunteer SHIP counselors (counted in a) contributed to the SHIP program counseling or working directly on behalf of clients. This includes the total number of hours spent on the following activities to resolve clients issues:

- outreach,
- presentations,
- referring,
- advocating (calling agencies on the clients behalf),
- trying to reach the client,
- waiting to meet with a client,
- traveling,
- preparing materials to send to the client, and
- completing paperwork/forms to report the client contact.

e. SP-Paid Member Hours: the total number of hours the SP-paid members (counted in b.) spent in outreach/presentation activities described in d) above.

f. In-kind Paid SP Member Hours: the total number of hours the in-kind paid member (counted in c.), spent in counseling activities described in d) above.

g. Value of In-Kind

## **SECTION 6 - NUMBER OF LOCAL SENIOR PATROL COORDINATORS AND HOURS**

**Coordinator/sponsor definition:** a person from a local or field SHIP site (see above definitions) who may do one or more of the following:

- supervises counselors,
- recruits counselors,

- trains counselors,
- meets with counselors,
- provides administrative support (schedules meetings, provides travel reimbursement),
- publicizes the SP program,
- oversees data reporting,
- distributes informational materials,
- conducts public and media activities such as presentations or health fairs.

Do NOT include persons/organizations that:

- only provide meeting or office space (these can be described in Section 12),
- contribute no time to the SP program,
- provide the same services as a SP coordinator for another similar program that is not considered part of the SHIP program.

NOTE: Coordinators can also counsel clients, and thus may also be included both in the number of counselors in Section 5 a), b), or c) and in the number of coordinators in Section 6 a), b), or c). However, do not double count their hours by including total hours in both Section 5 d), e) or f) and Section 6 d), e) or f). Rather, separate counseling hours from coordinator hours if possible. For example, if a coordinator spends 8 hours per week doing outreach/presentations and the remaining 32 hours per week performing SP coordinator functions, you would indicate 8 hours X 4 weeks = 32 hours in Section 5 d), e), or f) and 32 X 4 weeks = 128 hours in Section 6 d), e), or f).

**a. # of Volunteer (unpaid) SP Coordinators:** the number of persons who:

- performed the SP coordinator functions defined above AND
- did not receive compensation for their time or services (but may have received travel reimbursement).

**b. # of SP-paid Coordinators:** the number of persons who:

- performed the SP coordinator functions defined above AND
- received compensation for their time from the SHIP program, regardless of whether their salary was funded by CMS, the state, or some other funding agency.

**c. # of In-kind Paid SP Coordinators:** the number of persons who:



- performed the SP coordinator functions defined above AND
- received compensation from a program other than SHIP.

Examples include: RSVP staff, hospital staff, senior center staff, Senior Information and Referral staff, Area Agency on Aging staff, and outreach social workers.

**TOTAL # Coordinators (a+b+c):** Add the numbers of the three types of coordinators.

- d. **Volunteer (unpaid) SP Coordinator hours:** the total number of hours the volunteer (unpaid) coordinators (counted in a.) contributed to the SP program performing the functions of a coordinator, as defined above.
- e. **SP-Paid Coordinator Hours:** the total number of hours the SP-Paid coordinators (counted in b.) contributed to the SHIP program performing the functions of a coordinator, as defined above.
- f. **In-kind Paid SP Coordinator Hours:** the total number of hours that the In-kind paid coordinators (counted in c.) contributed to the SP program performing the functions of a coordinator, as defined above.

**g. Value of In-Kind**

## **SECTION 7 - NUMBER OF SENIOR PATROL OTHER PAID STAFF AND HOURS**

**Other paid staff definition:** persons who performed other functions for the SP aside from the outreach and presentations described above. These persons can include: state project directors, trainers, receptionists, administrative staff, etc. These types of paid staff can work in the state office or local/field sites.

- a. **# SP-Paid Other Staff:** the number of persons who:
  - performed the functions of other paid staff defined above AND
  - received compensation for their time and services from the SHIP program, regardless of whether their salary was funded by CMS, the state, or some other funding agency.

- b. **# In-kind Paid Other Staff:** the number of persons who:

- performed the functions of other paid staff defined above AND

- received compensation for their time and services by a program other than SHIP.

Examples include: RSVP staff, hospital staff, senior center staff, Senior Information and Referral staff, Area Agency on Aging staff, and outreach social workers.

**c. Value of In-Kind**

**d. SP-Paid Other Staff Hours:** the total number of hours that the SP-Paid other staff (counted in a.) contributed to the SP program in activities defined above.

**e. In-kind Paid Other Staff Hours:** the total number of hours that the In-kind paid other staff (counted in b) contributed to the SP program in activities defined above.

**f. Value of In-Kind**

## **SECTION 8 - COUNSELOR TRAININGS**

**a. # Initial Training(s) for New SP Members:** the total number of initial training sessions held throughout the state during the reporting period for new counselors, including volunteer or paid counselors. For example, if 20 local sites in the AAA Region conduct one initial training each during the reporting period, report 20 initial training's. If 4 local sites hold 2 initial trainings each, report 8 initial trainings. Initial trainings that last several days should be counted as one training.

**b. # New SP Member Attending Initial Training(s):** the total number of new members, including volunteer or paid members, who attended an initial training session for new members.

**c. TOTAL # SP Member Hours in Initial Training(s):** multiply the number of members who attended initial training (counted in b.) by the number of hours of the initial training session. For example, if ten members attended a two day (totaling 16 hours) initial training session, then report 160 total counselor hours in initial training.

**d. # Update Training(s) for SP Members:** the total number of update training sessions held throughout the state during the reporting period for members, including volunteer or paid counselors. An update training includes regular meetings or training sessions during which members are given updates on topics

including but not limited to: Medicare Fraud changes, member skills development, and Senior Patrol program procedures. For example, if 5 local sites in the AAA Region conduct one update training each during the reporting period, report 5 update trainings. If 4 local sites hold 2 update trainings each, report 8 update trainings. Update trainings that last several days should be counted as one training.

- e. **# SP Members Attending Update Training(s):** the total number of counselors, including volunteer or paid counselors, who attended an update training session.
- f. **TOTAL # SP Member Hours in Update Training(s):** multiply the number of members who attended update training (counted in e.) by the number of hours of the update training session. For example, if ten members attend a two hour update training session, then report 20 total counselor hours in update training.

## **SECTION 9 - NUMBER OF ACTIVE COUNSELORS WITH THE FOLLOWING CHARACTERISTICS (OPTIONAL)**

Note: Characteristics should be reported for all active counselors counted in Section 1.

a. **Years of SHIP service:** enter the number of counselors who (at the end of the reporting period) had participated in the SHIP program (regardless of which state) for less than 1 year, 1 up to 3 years, 3 up to 5 years, or over 5 years. Also enter the number of counselors for whom this information is not known (not collected).

b. - e. **Counselor demographic information (ethnicity/race, age, disability status, gender):** The number of counselors with each characteristic plus the number for whom this information is not known (not collected) for each characteristic should equal the total number of counselors entered in Section 1. This includes any persons who provided counseling (volunteers, staff paid by SHIP, or in-kind staff), who may or may not have also performed other duties for the SHIP (coordinator, project director, trainer, receptionist, etc.).

## **SECTION 10 - WEB SITE VISITORS (if applicable)**

If your SHIP has its own web site, fill in the number of visitors. Visitors means the number of people who viewed any page of your web site, NOT the total number of

pages viewed by that individual. Some duplication of people may occur if someone visits your web site several times during each quarter in the reporting period.

## **SECTION 11 - CASE SUMMARIES**

**"Case Summaries"** allow programs to record a brief summary of interesting and/or unusual cases handled by your counselors and staff. This is an extremely important part of the NPR. It "puts a face" on the cases and problem areas served by SHIP counselors. Also, narrative case summaries are one of the best ways to demonstrate the outcomes of your work because they show the depth and scope of beneficiary problems, the inter-disciplinary nature of benefits and insurance problems, and prove the need for one-on-one assistance for a beneficiary who would not otherwise access the benefits and services she or he truly needs. Case summaries are also especially useful in testimony before Congress and other public presentations concerning the importance of the national SHIP program.

Please attach additional pages as needed. Programs should record at least three case summaries which have taken place within each reporting period. As always, do not include any client identifying information in the summaries.

## **SECTION 12 - ACTIVITIES, LESSONS LEARNED, SIGNIFICANT EVENTS**

In this section, SHIP directors are asked to describe activities, lessons learned (including challenges and problems encountered), significant events or

developments that they want to share with other SHIP programs and HCFA. Please organize the narrative by using the following headings: Outreach (including strategies for under-served populations), Information Access and Dissemination, Training of Staff and Volunteers, and Partnership and Networking (including relationship with carriers, HCFA regional offices, etc.) These headings correspond to those in the SHIP grant application and you are encouraged to include and update the information you prepared for the grant applications in these categories. Additional page(s) should be used for this section.

It is anticipated that Sections 7 and 8 together will demonstrate the varied and challenging program goals, the special outreach methods employed to serve diverse populations, the technical complexity of the SHIP subject matter, and the extensive skill that resides in the SHIP corps of competent and compassionate volunteer health insurance counselors.

#### SECTION 13 – NUMBER OF COUNSELING SITES

In this section, record the number of counseling sites located in your area.

#### SECTIONS 14 – NUMBER OF TRAINING ATTENDED BY STAFF

In this section, write the number of trainings that you or any paid staff attended.